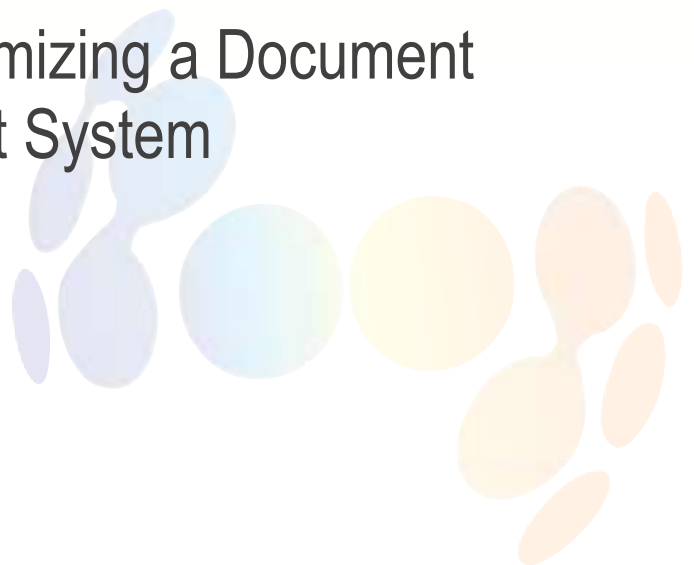




## White Paper: A Few Gotchas to Watch out for When Customizing a Document Management System



## Customizing Your Document Management System?

**Be Careful What You Wish For** by Andy Eberhard

If I had a dollar for every time that I have heard another consultant or myself say to a client – “Try to customize your system as little as possible” I would be a rich man. But if I had another dollar for every time that a client failed to take that advise, then I would be a filthy rich man. On the surface it is easy to say that you will not customize your document management system or any system for that matter. But in reality, no system will match your processes exactly and the clamor of users to go back to processes and functionality that they are used to having will often win out over keeping your document management system non-customized. So what is a systems project manager or IT department head to do?

## Understand Your User’s Requirements and the Differences Between Needs, Wants, and Nice-To-Haves

Every user wants an “Easy” button. And who can blame them. In theory if a process or function can be done more easily and faster, all other variables remaining the same, a resource should have more time to perform other value added tasks for the company. However, we know that theory is good for the class room but often runs amok in real life. For instance, if I put in a \$10,000 customization for an end user that allows them to index their documents a certain way and another end user wants another \$10,000 customization so that they can index their documents another way, do you really think that the savings will justify the costs? The intent of each user may be good but are two customizations justified? In the users eyes the answer is going to be almost always ‘Yes’. Why? Because you made their job easier or you made their job like it was before so they don’t have to deal with change. But will they actually save time, if there is a savings in time, and use it for something else that will lead to a productivity gain. Or will they use it to take more breaks, slow down, or relax more. It is hard to say but before saying ‘Yes’ to a document management customization that will cost x amount of dollars for both installation and support, it is important to understand why the customization is really needed and if the end will justify the means. Is the customization really needed because it will lead to hard benefits and measurable productivity increases? Or is it just a nice-to-have because it will make the life of the user easier but it won’t do anything that will lead to productivity gains or even long term job satisfaction? Answering those questions first is important.

## Determine If An Off the Shelf Solution Will Trump Customization

If a system change is justified, then before customizing you will need to find out if there is already an off the shelf solution that meets your needs. You don’t want to end up reinventing the wheel if you can buy an off the shelf product that does the same thing and hopefully at a lower cost. However, there are pit falls to that line of thinking. Although an off the shelf solution may sound more ideal than a customized solution, keep in mind that if you do find an off the shelf solution you need to ask what it will take to integrate and implement the solution. In the end it may cost you more to integrate and support an off the shelf solution then if you implemented a customization. There are many variables to factor into your

decision besides just cost. For instance there needs to be very tight integration between your document management solution and the out of the box solution that takes the place of customization. Here is a simplified example. You have purchased and implemented Microsoft SharePoint®. But you need an easy and effective way to capture documents to feed into SharePoint. Now you could go to a reseller or consultant and ask them to build you a very simple customized data capture tool that will provide for scanning and importing of documents into SharePoint. But why would you do that when there are plenty of Data Capture applications on the market? So you start looking into simple Data Capture systems but you quickly realize that not all of them have good integration with SharePoint. Documents need an efficient entry point into the SharePoint repository that includes accurately building index data and correctly storing the documents within the associated SharePoint library. Not all data capture applications on the market today offer that needed integration. So if you were to buy one of those applications then you may get an unpleasant surprise when it does not integrate with SharePoint. Fortunately, some data capture applications do, so in this case you can find data capture applications such as Quillix™ Capture that will integrate with SharePoint at a low total cost of ownership. The point is that before you decide to customize your document management system, you should do your homework and see if there is another avenue that you can pursue that will provide the same solution but without the customization. Just remember that integration is key and if the plumbing is not done correctly, then the rest of the house will be more or less non-functional.

## **If You Need to Customize, Implement Wisely**

If you have weighed the costs and benefits and you have decided that a customization is justified, it is important to implement your customization wisely. Although important, I'm not talking about project planning and testing but rather on how you plan to implement and manage your customization. For instance, if the customization that you ask for is a one-off and never used again, then maybe it is better to work with your IT department and document management vendor to ensure that everyone knows (and it is documented) that this is a one-off customization that will be needed for a certain purpose but then not needed again.

After the customization is implemented and its purpose for existing is completed, then the customization should either be pulled out of the system or process or it should be commented out if it is embedded in code and cannot be easily extracted. Everything should be well documented. If the customization is a permanent change, then you should consider the benefits of making it a modular customization. What that means is that instead of making it a one off customization, work with your document management vendor or reseller to see how the customization could be used at other clients. Your vendor or reseller/consultant will be happier to write and support 'customized' solutions and give you a better price if they believe that they have a chance at selling it as a product to other clients down the road. Plus, supporting the customization will be more straight forward because supporting one-off customizations can be challenging for both you and your vendor as there is usually no good way to delineate issues. As a modular customization, ongoing support and future upgrades and releases will be more easily handled and fewer disagreements will result. Just make sure that the requirements and boundaries of the custom module are well defined for both you and your vendor or consultant. The

bottom line is that customizing a document management system to meet your user's needs should be looked at closely. First determine if it really needs to be done in the first place based on a return on the investment. Then weigh your options for whether or not an off the shelf solution can be implemented or integrated with your document management solution, and finally, decide how the customization itself should be implemented. Should it be implemented as a one time, short lived customization, a one-off long life customization, or a customized 'module' that may allow for a better support and upgrade model in the long run. Thinking through your customization options will save you time and money in the long run. Although it may seem like a quick solution in the short run, a customization that is not thought through and considered carefully may end up being a real headache for all parties in the long run.

## About UFC Inc.

UFC Inc is a consulting, integration and solutions firm preferred by clients in the Oil and Gas Industry for our quality, innovation and integration expertise. UFC provides data capture, enterprise content management software, support and integration services - based on a flexible architecture and common set of applications for collecting, classifying, retaining, migrating, securing and accessing information – all at the lowest cost of ownership.

Unlike vendors that deliver generalized ECM products with centralized or consolidated architectures, or support few applications and data types, UFC delivers the most comprehensive solution, specifically tailored for the customer. The distributed nature of the solution along with UFC's extensive expertise and unique approach makes it ideal for the Oil and Gas company with remote offices that have limited storage space, minimal IT infrastructure or technical support. Remote locations realize significant improvement in operational efficiencies, improved collaboration, a reduction in storage costs - without sacrificing centralized control or visibility of information. From capturing personnel information such as fuel cards and human resource forms to capturing and storing engineering drawings and correspondence, UFC provides the Oil and Gas industry the ability to reduce paper transaction costs while increasing their data processing efficiencies.

Call us today to find out how we can help your organization at (248) 447-0100 or email us at [sales@ufcinc.com](mailto:sales@ufcinc.com).

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